SIMM 17 E

The OCIO is committed to assisting departments and agencies with the successful completion of state Information Technology (IT) projects. In support of this goal, the OCIO has instituted the California Project Management Methodology (CA- PMM) Qualified requirement for Project Managers. The OCIO has also established training requirements for state and contractor staff engaged in supporting IT projects, including Project Managers, lead project staff, Project Sponsors, and executives.

I.   Basic Training Requirements

A.   Project Manager CA-PMM Qualified Requirement

1. All Project Managers must be CA-PMM Qualified (CalQ) before they can manage an IT project. To be considered CalQ:

   - Project Managers must complete the training requirements according to the size of the project they are managing in the timeframes specified in Section I.A.2 immediately following. See Section III, Project Size Determination, to determine project size, and Section IV, CalQ Curriculum, for the specific training requirements.

     Please note that a Project Manager may provide evidence of training or previous project management experience to meet most of these training requirements.

   - Included in the CalQ Curriculum is training in the CA-PMM and the use of the CA-PMM Toolkit. All Project Managers must be trained in the CA-PMM before they can manage a project.

     Please note that Project Managers that have already met the other CalQ requirements may meet this training requirement by taking the *CA-PMM Express Training for Project Managers* course.

2. Project Managers will be granted an initial time period in which to complete the CalQ requirement.

   - For all new projects sized Medium and above approved after January 1, 2009, prospective Project Managers must attain CalQ status no later than 90 days after the release of the CA-PMM IT Policy Letter or the project approval date, whichever is later.

   - For all new Minor and Small sized projects approved by the OCIO after January 1, 2009, prospective Project Managers must attain CalQ status no later than 180 days after the release of the CA-PMM IT Policy Letter.

   See Section III, Project Size Determination, to determine project size.

B. Team Lead Training Requirements

All project Team Leads must be trained in the CA-PMM. At a minimum, team leads must take the *CA-PMM Basics* course described in Section IV, CalQ Curriculum.

- For all new projects approved after January 1, 2009, prospective project team leads of projects sized Medium and above must be trained in the CA-PMM no later than 120 days after the release of the CA-PMM policy letter.

- For all new Minor and Small sized projects approved by the OCIO after January 1, 2009, prospective team leads must be trained in the CA-PMM no later than 180 days after the release of the CA-PMM policy letter.

See Section III, Project Size Determination, to determine project size.

C. Other Team Member Training Requirements

- Project Executives are encouraged to participate in the Executive Briefing training course.
- Project Sponsors are encouraged to participate in the Sponsor Seminar training course.

II. Qualifications for IT Project Managers

Agency Information Officers (AIO) and Department Chief Information Officers (CIO) should ensure that prospective Project Managers possess the requisite knowledge, skills and abilities to successfully manage an IT project.

Project Manager Qualification Guidelines

Assigning a skilled Project Manager is of critical importance to the success of IT projects. The qualifications of a Project Manager should be commensurate with the complexity of the project.

- **Minor and Small Sized Projects –** The Project Manager should have some training in project management methodology and project management tools. In addition, the Project Manager should have an interest in and reasonable knowledge of the product that is being created by the project.

- **Medium Sized Projects –** The Project Manager should have experience on several small, focused project efforts and developed their general management and business skills to the point that they can manage people and technology by delegation. Medium sized projects typically incorporate more than one technology type or functional group, and the Project Manager needs to be able to manage several different functional groups with different needs.

- **Large and Mega Sized Projects –** The Project Manager should have led many high-profile medium sized project engagements and be well recognized for their efforts. A project manager at this level must be able to understand the technology being used but not necessarily be an expert in it. Project managers will be spending most of their time working the planning and controlling aspects of the project as well as dealing with the "political" issues. Delegation, time management, and interpersonal skills are keys to success. Large projects are those that are agency-

wide or extend beyond the agency itself. The person must have the unwavering confidence of agency management and be considered an acceptable and respected representative for the agency.

III.   Project Size Determination

Project size is determined by identifying the project's Complexity Rating, Total Cost and Duration. Refer to the following chart to identify project size:

Size	Complexity Rating	Total Cost	Duration
MINOR	Less than 1.5	Under $500,000	Under 6 months
SMALL	1.5 to less than 2	Over $500,000, under $1 million	Over 6 months, under 1 year
MEDIUM	2 to less than 3	Over $1 million, under $5 million	Over 1 year, under 3 years
LARGE	3 – 3.5	Over $5 million, under $100 million	Over 3 years, under 10 years
MEGA	Over 3.5	Over $100 million	Over 10 years

IV. CalQ Curriculum

A. <u>Four Categories</u>

The CA-PMM training curriculum is divided into four categories:

1. **Primary Curriculum –** Primarily for Project Managers of Minor and Small sized projects. Project Managers must complete the entire Primary CA-PMM training curriculum to achieve CalQ status to manage a Minor or Small state IT project.

CA-PMM Course Name	CA-PMM Course Description	Length
CA-PMM Boot Camp for Project Managers	Comprehensive training in project management using the California Project Management Methodology (CA-PMM) and CA-PMM tools.	5 days
CA-PMM Express Training for Project Managers	An accelerated training in the CA-PMM methodology and CA-PMM tools. Note: This course is intended for individuals who are PMP certified or who have project management experience equivalent to CalQ status.	2 days
Project Risk Management	Project Risk Management best practices.	1 day
Communication Skills for Successful Project Results	Provides best practices for effective communication with project team members, sponsors and stakeholders.	1 day
Managing Effective Project Meetings	Provides best practices for conducting effective project meetings.	1 day
Team Leadership for Project Managers	Best practices for leading project teams	1 day
Leading Change in a Project Environment	Provides best practices in preparing end users and others to deal with the change a project will introduce into their work lives.	1 day
Microsoft Project 1	How to use the Microsoft Project application to perform basic project planning and scheduling.	1 day

2. **Secondary Curriculum –** Required for Project Managers of projects sized Medium and above. Project Managers must complete all of the Primary and Secondary CA-PMM training curriculum to achieve CalQ status to manage a state IT project sized Medium or larger.

CA-PMM Course Name	CA-PMM Course Description	Length
Procurement and Vendor Management	How to evaluate vendor proposals and manage vendor performance.	2 days
Win/Win Negotiation for Project Managers and Team Members	Prepare project managers to successfully apply negotiation best practices throughout the life of a project.	1 day
Essential Presentation Skills for Projects	How to prepare and deliver effective project presentations.	2 days
Microsoft Project 2	How to use the Microsoft Project application to perform intermediate to advanced project management operations.	1 day
Earned Value Management	How to calculate, track and manage project earned value.	1 day
Project Portfolio Management	Best practices in managing a portfolio of projects.	1 day
Project HALT	Dealing with troubled projects.	1 day

3. **Allied Curriculum –** Required for Project Team Leads, Executives, and Sponsors.
   - Project Team Leads must complete the CA-PMM Basics course.
   - Project Executives are encouraged to participate in the Executive Briefing training course.
   - Project Sponsors are encouraged to participate in the Sponsorship Seminar training course.

Project Role	CA-PMM Course Name	CA-PMM Course Description	Length
Lead Project Staff	CA-PMM Basics for Project Team Members	Introduces the CA-PMM methodology and CA-PMM tools to project team members.	2 days
Executive	Executive Briefing	Orientation for executives on the CA-PMM methodology and the project lifecycle.	½ day
Sponsor	Sponsorship Seminar	Trains participants on the role, responsibilities and practices of effective project sponsors.	½ day

4. **Elective Courses –** These courses may be useful for staff on a project, but are not required.

Project Manager	PMP Exam Prep Course	Elective – Prepare candidates to pass the PMP certification exam.	4 days

B. CA-PMM Training Prerequisites

CA-PMM training courses are designed for experienced individuals with a foundational experience in the leadership and execution of IT projects. Individuals who do not have sufficient basic project management experience will find it difficult to keep up with the level of instruction and the pace of courses.

Refer to the following prerequisite guidelines to determine eligibility for key CA-PMM Project Management courses:

Prerequisite Guidelines	CA-PMM Course
• Experience in serving on at least one state IT project. • Familiarity with basic project management terminology and processes.	5-day CA-PMM Boot Camp for Project Managers
• Experience equivalent to CalQ status	2-day CA-PMM Express Training for Project Managers

C. CA-PMM Training Availability

CA-PMM training will be available from the Department of Technology Services. (A link to CA-PMM training course descriptions and schedule will be forthcoming)

Additional training sources will become available in 2009.

V. Validation Documentation

The AIO or the Department CIO, as appropriate, is responsible for certifying and retaining the supporting information that project managers possess the appropriate CalQ requirements before approving their assignment to an IT project. CalQ supporting information is subject to audit by the OCIO upon notification to the agency or department.

In addition, AIOs or CIOs must document that each Project member has completed the required training. Documentation should identify the training or experience used to meet the CA-PMM course requirement, the training provider, the location of the training or experience, and the dates of occurrence.

As a reminder, requirements may be met through current training, previous equivalent training or previous experience.